

Application: 6515

Anusha Dwivedula Driving Responsible AI and Scalable Data Innovation in Financial Services

Page: General Information
Provide information about the company to be considered for the award. If you will be nominating an individual, specify the nominee's employer.
Name of Organization/Company Morningstar
Mobile Phone Number +1 314-478-7219
Additional Contacts I do not wish to list additional contacts
Page: Entry Information
Entry Title Anusha Dwivedula Driving Responsible AI and Scalable Data Innovation in Financial Services
Category E11. Employee of the Year - Artificial Intelligence
Employee Nominee Submission Format Written Answers
a. Briefly describe the nominated non-executive person's employer: the organization's history and past performance (up to 200 words). Required <p>Morningstar, Inc. is a leading global provider of independent investment research and data, headquartered in Chicago and operating in over 30 countries. Founded in 1984, Morningstar delivers a comprehensive suite of products and services—including managed investment portfolios, investment research, proprietary risk models, and software platforms—serving individual investors, financial advisors, asset managers, and institutional investors.</p> <p>Morningstar's mission is to empower investor success by delivering insights that investors can trust. Its offerings span public and private markets and are delivered through trusted platforms like Morningstar Direct, Advisor Workstation, and Morningstar Data. The firm's long-term strategy focuses on embedding Morningstar's insights into client workflows via scalable, cloud-enabled, and AI-driven platforms that enhance the transparency and usability of financial data.</p> <p>Morningstar reported \$2.275 billion in 2024, an 11.6% increase from 2023, reflecting its growth and resilience across global markets. Its acquisition of PitchBook in 2016 and subsequent innovations—like the 2025 launch of the Morningstar PitchBook Buyout Replication Index—illustrate its leadership in combining public and private market insights. With over \$266 billion in assets under management and advisement (as of 2023) and more than 10,000 employees worldwide, Morningstar continues to set the standard for responsible, data-driven investment decision-making across the global financial ecosystem.</p>
b. Outline the nominated non-executive employee's achievements since the beginning of 2023 that you wish to bring to the judges' attention (up to 250 words). Required <p>In 2023, Anusha Dwivedula led a foundational shift in Morningstar's Data & Analytics group by implementing a data mesh operating model—an evolution following the successful buildout of the firm's enterprise self-serve data platform.</p> <p>This transition redefined how data was governed across domains, driving improved accountability, domain ownership, and data quality. As product lead for Calculation Services, she embedded best practices in data stewardship, lineage, and access control, enabling the delivery of trusted data across investment workflows.</p> <p>In 2024, Anusha spearheaded a company-wide AI-driven observability initiative. Anchored by her proprietary "Trust Sandwich" framework, the system operationalizes responsible AI via infrastructure-level monitoring, anomaly detection, and human-in-the-loop validation.</p> <p>This platform now underpins Morningstar's most critical IP assets:</p> <ol style="list-style-type: none">1. Morningstar Portfolio Risk Score (MPRS): Over 2 million scores recalculated monthly across flagship platforms.2. Medalist Rating: Coverage expanded to 400,000+ share classes3. Total Return Index: Modernized calculations across 800+ investments. <p>Her leadership reduced modernization timelines by 67%, increased regulatory resilience, and set a scalable foundation for AI trust in financial data systems.</p> <p>Beyond Morningstar, Anusha is making a significant impact on the industry. She authored an IEEE paper on AI quality frameworks, with additional work accepted at IEEE AITest 2025. A recognized thought leader, she has spoken at over 10 events, including IEEE CAI, INFORMS Analytics Showcase, Chief AI Officer Summit, and Women Impact Tech. She was named INFORMS Chicago's "Professional of the Year 2024," recognized as a "Leader of Impact 2025" by Women Impact Tech, and accepted into the prestigious AI2030 Global Fellow Program</p>

Anusha Dwivedula's achievements stand out not only for their scale and technical depth but also for their lasting organizational impact, delivered without a VP or executive title. Her work has redefined how Morningstar approaches data ownership, quality, and AI governance across its global data ecosystem.

In 2024, her leadership in building a responsible AI-powered observability platform set a new standard. Most organizations focus narrowly on anomaly detection or dashboards. Anusha went further, designing a full-stack observability model ("Trust Sandwich") that integrates technical infrastructure, AI, and human oversight. This directly accelerated modernization timelines by 67% and enabled scalable, explainable outputs for high-stakes calculations like MPRS and the Medalist Rating—capabilities often siloed in much larger AI teams.

d. Reference any attachments of supporting materials throughout this nomination and how they provide evidence of the claims you have made in this nomination (up to 250 words). Optional

Peer-Reviewed IEEE Paper (Published):

Accepted Paper – IEEE AITest 2025:

Business Impact Metrics:

Thought Leadership:

Awards and Advisory Roles:

Collectively, these materials demonstrate Anusha's sustained, high-impact contributions across technical innovation, business transformation, and industry thought leadership.

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No

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